



Section B. Institution Record: Search

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Institution Record



Section B. Institution Record: Update

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B-1. Search Records: by LIBID, Institution, or Contact Name

Enter LIBID, if known -

The screenshot shows the DOCLINE search interface in a Microsoft Internet Explorer browser window. The address bar shows <http://docline.gov/docline/login.cfm>. The navigation bar includes links for Home, Requests, Serial Holdings, Institutions, and Loansome Doc Patrons. The search bar has a "Search" button and an "Update MAUMAS" button. Below the search bar, there are three input fields: "LIBID" (containing "MAUMAS"), "Institution Name", and "Contact Name". Each field has a "SEARCH" button. A "More Search Options >>" link is also present. The results section shows a single entry for "MAUMAS" with the description "University of Massachusetts Medical Center :: The Lamar Soutter Library/ ILL DEPT."



Tip: To retrieve multiple institution records simultaneously, enter complete LIBIDs followed by a space or a comma.

Example: To view Institution records for UNH, type in LIBID's -

The screenshot shows the DOCLINE search interface in a Microsoft Internet Explorer browser window. The address bar shows <http://docline.gov/docline/login.cfm>. The navigation bar includes links for Home, Requests, Serial Holdings, Institutions, and Loansome Doc Patrons. The search bar has a "Search" button and an "Update MAUMAS" button. Below the search bar, there are three input fields: "LIBID" (containing "NHUUHA, NHUIVS"), "Institution Name", and "Contact Name". Each field has a "SEARCH" button. A "More Search Options >>" link is also present. The results section shows a single entry for "MAUMAS" with the description "University of Massachusetts Medical Center :: The Lamar Soutter Library/ ILL DEPT."

B-1. Search Records: by LIBID, Institution, or Contact Name

When searching by the Institution (or Library) Name, all three names in the Institution, Document Delivery, and Billing Address fields are searched.



Example: To search for the Institution record of the “Lamar Soutter Library”, type in Institution Name -

STEP	ACTION: Find Institution by Name
1	On the DOCLINE navigation bar, select Institutions .
2	In the Institution Name input box, enter keywords from the institution name.
3	Click Enter -or-- click Search .

B-1. Search Records: by LIBID, Institution, or Contact Name



Tip: To perform a truncated search, enter an asterisk (*) at the beginning or end of a word.

To perform a phrase search, enter the search terms within double quotation marks.

Examples: V* AFFAIR*
*FIELD
"MEMORIAL LIBRARY"



Example: To search for a library in New England with “Memorial” as a portion of the library name, create two separate search criteria lines --

The screenshot shows the DOCLINE Search Builder interface. At the top, there are navigation links: Home, Requests, Serial Holdings, Institutions, and Loansome Doc Patrons. Below these is a search bar with a 'Search' button and an 'Update MAUMAS' button. The main section is titled 'Search > Search Builder' and contains instructions: 'Build your search by selecting from pulldown lists and filters.' There are two main sections for building the search: 'Build your search with one or more terms from the pulldown list' and 'Narrow your search with'. The first section shows a search criteria line: 'and' followed by 'Select Search Field' and 'Equal to'. The second section shows a search criteria line: 'Institution Name contains Memorial' AND 'Region equal to 08 - New England Region'. There is a 'SEARCH' button at the bottom right of the search criteria area.

Click **Search** and you should arrive with 49 results. Click the name link of your selection.

B-1. Search Records: by LIBID, Institution, or Contact Name

Type in desired contact name -

Contact names are stored as first name, middle name, last name in the database. Phrase searching should be limited to search only one part of the name, e.g. search “Mary Beth”, not “Jane Smith”.

STEP	ACTION: Find Institution by Contact
1	On the DOCLINE navigation bar, select Institutions .
2	In the Contact Name input box, enter one or more words from the person’s name.
3	Click Enter -or-- Search .
View	A list of institutions matching your search criteria display sorted by institution name.



Tip: To perform a truncation search, enter an asterisk (*) at the beginning or end of a word.
(MICH*, *STEIN)

B-2. SearchBuilder: Find institutions by Multiple Search Criteria

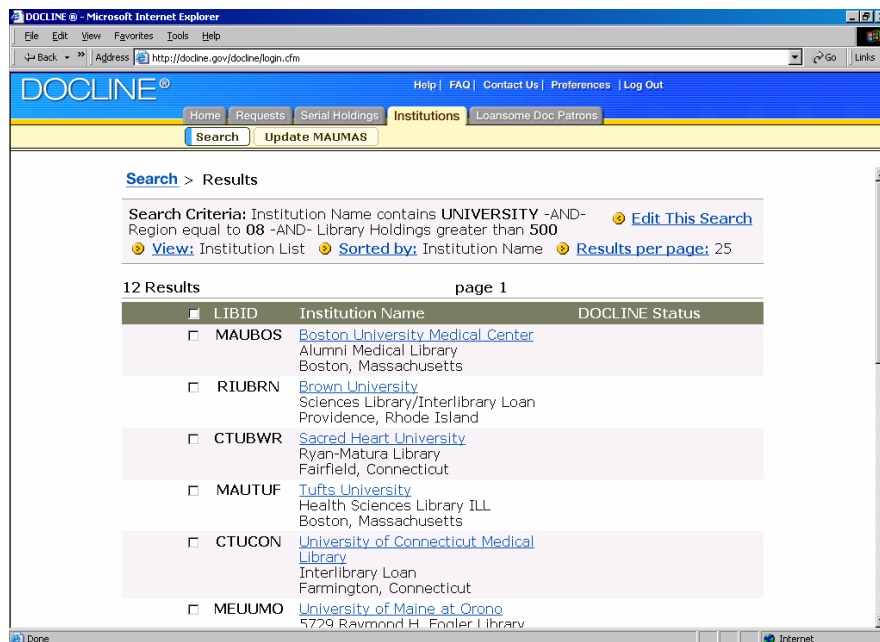
STEP	ACTION: Find Institution by Multiple Criteria
1	On the DOCLINE navigation bar, select Institutions .
2	Select More Search Options .
3	(Optional) To query a specific field in the institution record: a. Select the desired <i>Search Field</i> to query b. Select or enter search term (e.g. Contains, Equal to, Begins with, etc.) Note: Depending upon the <i>Search Field</i> selected, select from a drop-down list (e.g. Library Group or State/Province) -or- type in value (e.g. City or OCLC code). c. Click Add to Search .



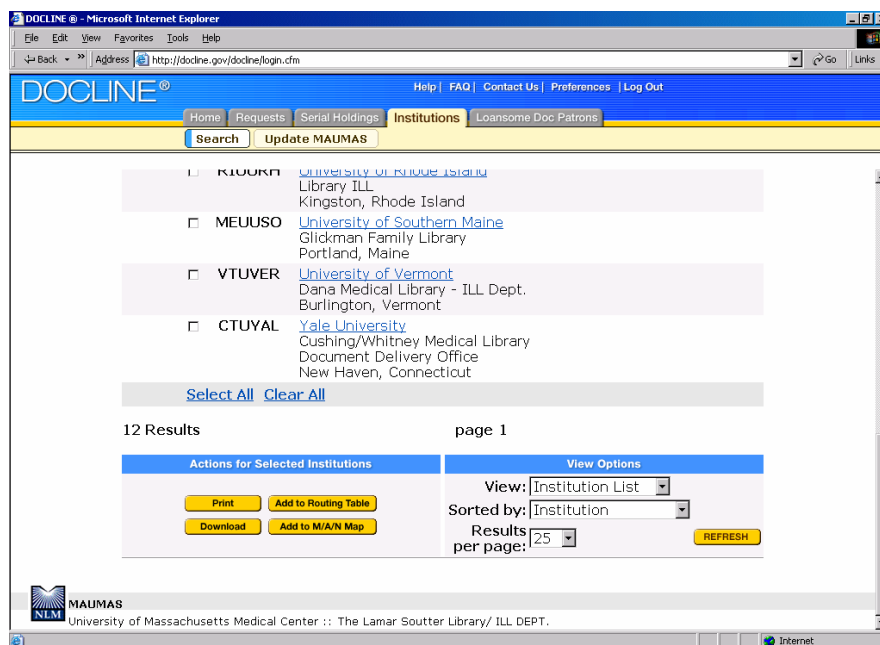
Example: Using *SearchBuilder*, search for academic institutions (universities) in New England with serial holdings in excess of 500 titles -

B-2. SearchBuilder: Find institutions by Multiple Search Criteria

The search produced 12 results -



Check off selections and click on yellow Action buttons -



B-2. SearchBuilder: Find institutions by Multiple Search Criteria

STEP	ACTION: Find Institution by Multiple Criteria + Filters
1	On the DOCLINE navigation bar, select Institutions .
2	Select More Search Options .
3	(Optional) To query a specific field in the institution record: a. Select the desired <i>Search Field</i> to query b. Select or enter search term (e.g. Contains, Equal to, Begins with, etc.) Note: Depending upon the <i>Search Field</i> selected, select from a drop-down list (e.g. Library Group or State/Province) -or- type in value (e.g. City or OCLC code). c. Click Add to Search .
4	(Optional) To search additional fields, select the Boolean operator, repeat Step 3.
5	(Optional) To limit your search results a. Click any of the buttons in the <i>Filters</i> box (Delivery Methods, Membership Information, or Services) b. Select the search limits to apply to the search c. Click Add to Search .
6	Click Search .

In addition to a host of search criteria, the *SearchBuilder* tool provides a number of filters to narrow your search.



Example: Using *SearchBuilder*, search for Institutions in New England that participate in FreeShare and provide RUSH requests using Ariel --

B-2. SearchBuilder: Find institutions by Multiple Search Criteria

Using *SearchBuilder*, search for institutions in New England that participate in FreeShare and will deliver RUSH requests using Ariel -

This search yielded 17 results -

LIBID	Institution Name	DOCLINE Status
MEUEMM	Eastern Maine Medical Center (*8) Parrot Health Science Library Bangor, Maine	
MEULWA	Lewiston Auburn College Library ILL Lewiston, Maine	
NHULRL	LRGHealthcare/Lakes Region General Hospital (*5) Jessup Library ILL Laconia, New Hampshire	
MEUKVM	MaineGeneral Medical Center at Augusta (*3) Library ILL Augusta, Maine	
MEUMMW	MaineGeneral Medical Center at Waterville (*6) Health Sciences Library ILL Waterville, Maine	
MEUMEY	Mercy Hospital (*1) Health Sciences Library ILL Portland, Maine	
NHUNHB	New Hampshire Community Technical College, Berlin (*4)	

B-3. Change View Options for SearchBuilder Results

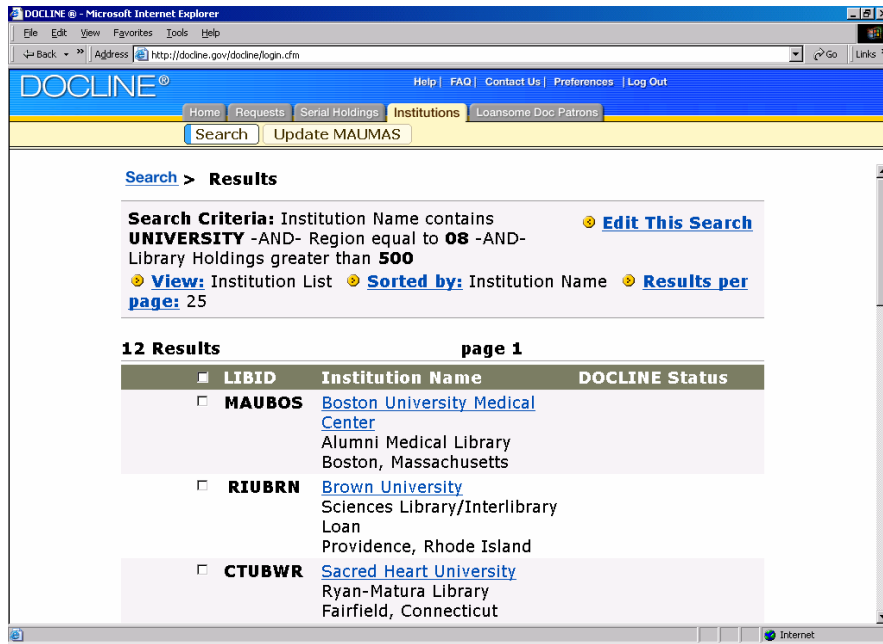
STEP	ACTION: Change View Option
1	On the Search Results page, click the View link in the search criteria display area.
View	The Search Results page is repositioned to display the <i>View Options</i> area.
2	Select the data element for sorting the display from the <i>Sort</i> drop-down list..
3	Click Refresh .



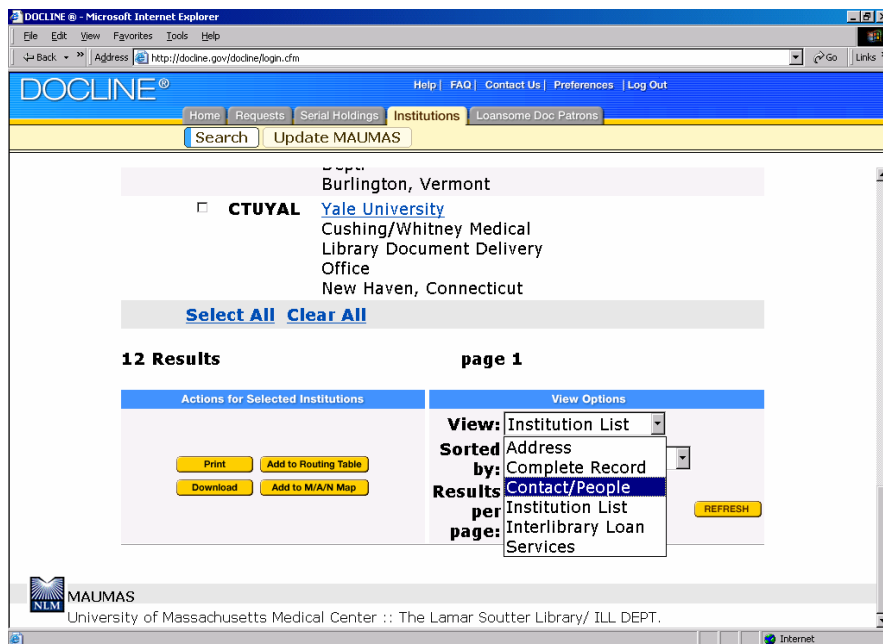
Example: For the search results from the previous page, change the view option from “Institution List” (default) to “Contact / People” -

B-3. Change View Options for SearchBuilder Results

Click **View** (at the top of the screen) -



Click drop-down list arrow for **View** (at the bottom of the screen) -



B-4. Change Output Display for Search Results

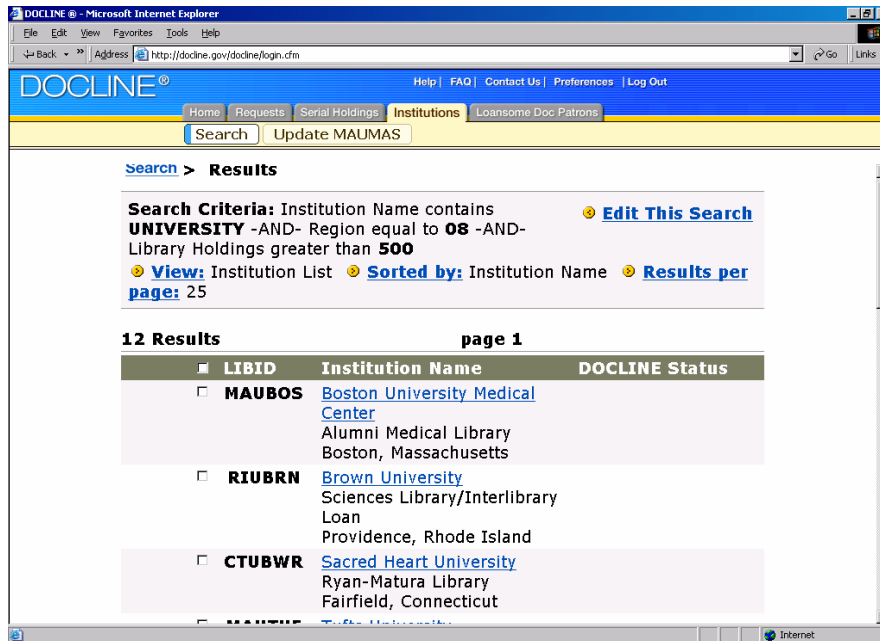
STEP	ACTION: Change Sort Order
1	On the Search Results page, click the View link in the search criteria display area.
View	The Search Results page is repositioned to display the <i>View Options</i> area.
2	Select one of the five categories of information to display from the <i>View</i> drop-down list. Address: Displays institution, document delivery, and billing address Contact/People: Displays all of the institution's staff contact information Institution List: Displays a list of the institutions with name, city, and state/province. Interlibrary Loan: Displays details of the institution's ILL services and costs Services: Displays a summary of the institution's offered ILL, Loansome Doc, and other services recorded in their institution record.
3	Click Refresh .



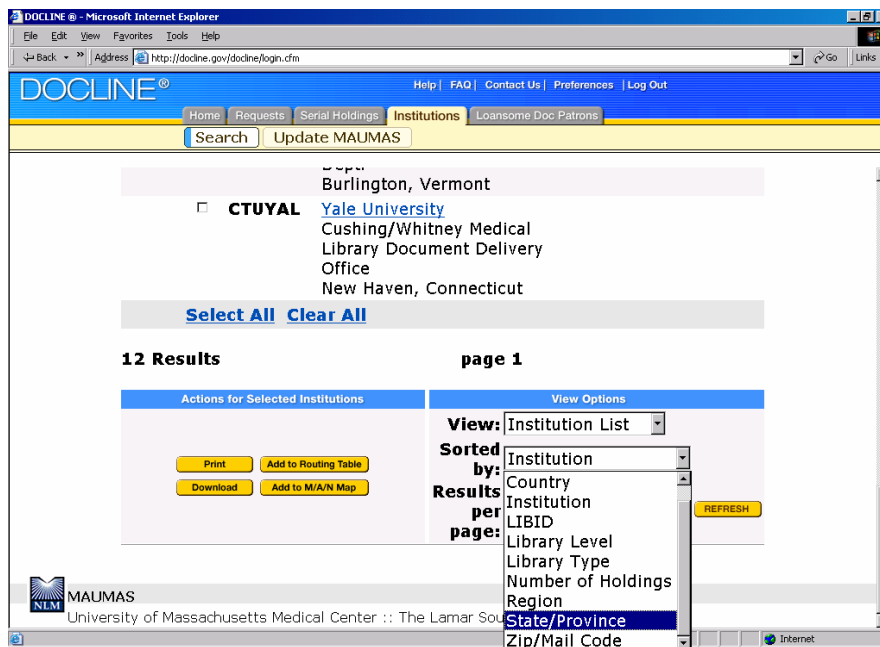
Example: For the current set of search, you've decided to change the sort order from "Institution" (default) to "State/Province" --

B-4. Change Output Display for Search Results

Click **Sorted by** (at the top of the screen) -



Click drop-down list arrow for **Sorted by** (at the bottom of the screen) -



B-4. Change Output Display for Search Results

STEP	ACTION: Change Number Records Displayed Per Page
1	On the Search Results page, click the View link in the search criteria display area.
View	The Search Results page is repositioned to display the <i>View Options</i> area.
2	Select the number of institutions to display from the <i>Results per page</i> drop-down list.
3	Click Refresh .



Notes:

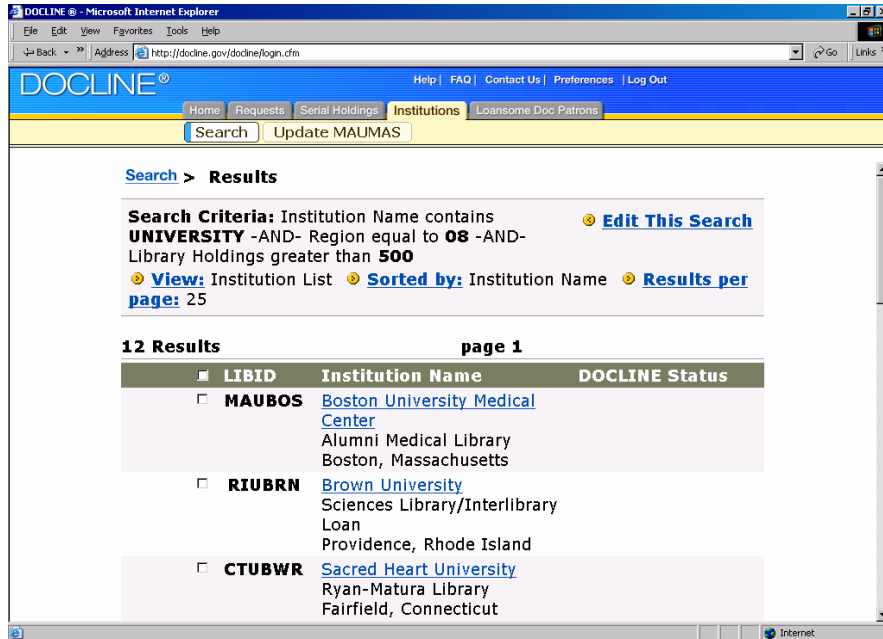
- The options listed in the number of records list are linked to the View selected.
- Views that contain large amounts of data will allow fewer displays of records.



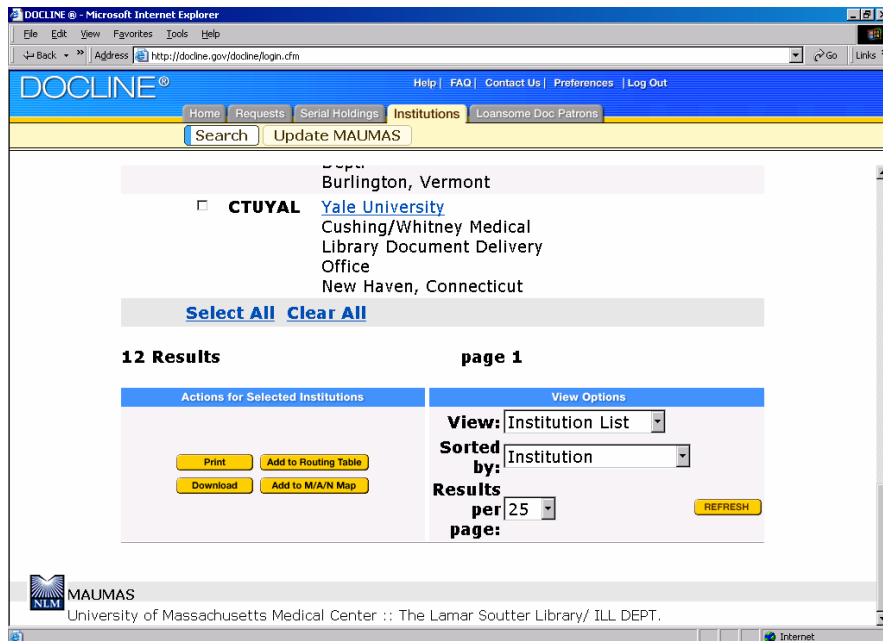
Example: For the current search, suppose you want to print out all of the results on a single sheet of paper, changing the number of records displayed per page **from** “25” (default) **to** “50” --

B-4. Change Output Display for Search Results

Click **Sorted by** (at the top of the screen) -



Click drop-down list arrow for **Results per page** (at the bottom of the screen) -



B-5. Modify Your Search Query

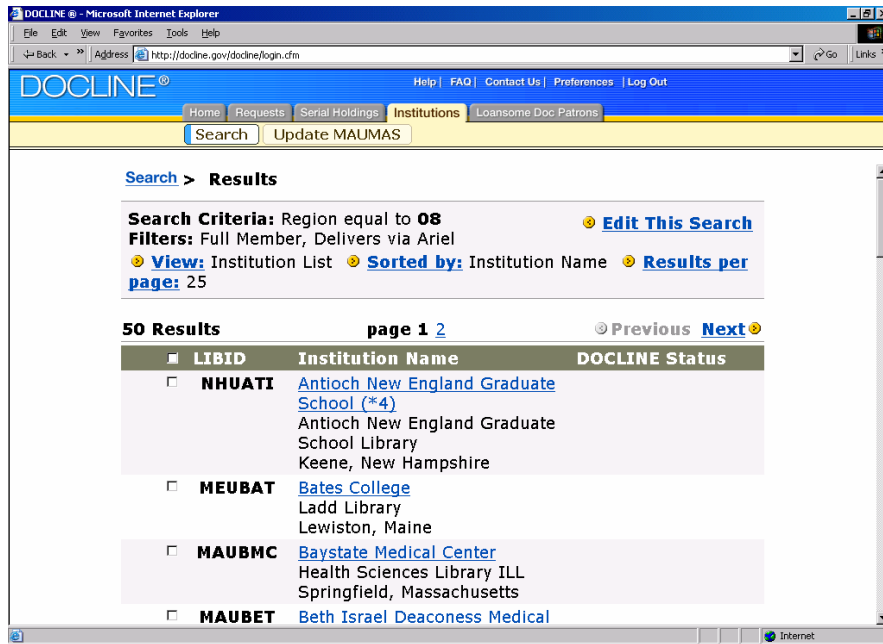
STEP	ACTION: Modify Search Query
1	On the Search Results page, click Edit This Search in the search criteria display area.
View	Your current search query is displayed on the Edit your search page.
2	You can modify your search query by: <div> Selecting a different Search Field and / or modifying the search term Add additional criteria by clicking Add Another Line Remove criteria by clicking delete to remove an entry. </div>
3	To modify your search filters, click Edit Filters Select or deselect any criteria to modify your search filters Click Add to Search .
4	Click Search .



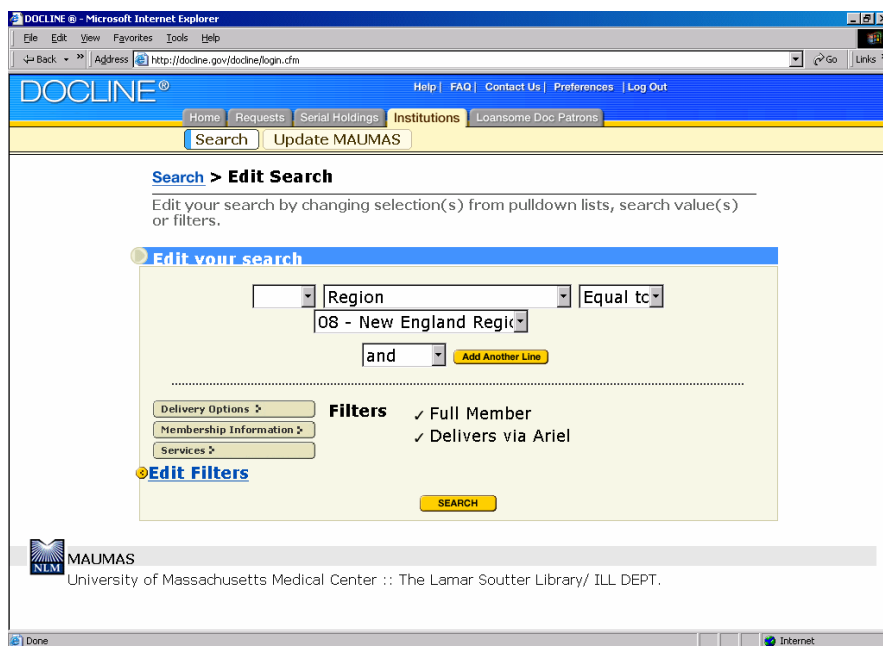
Example: You begin a search for Arielists in New England that are Full members of the NN/LM network -

B-5. Modify Your Search Query

The search produces too many results (50) --

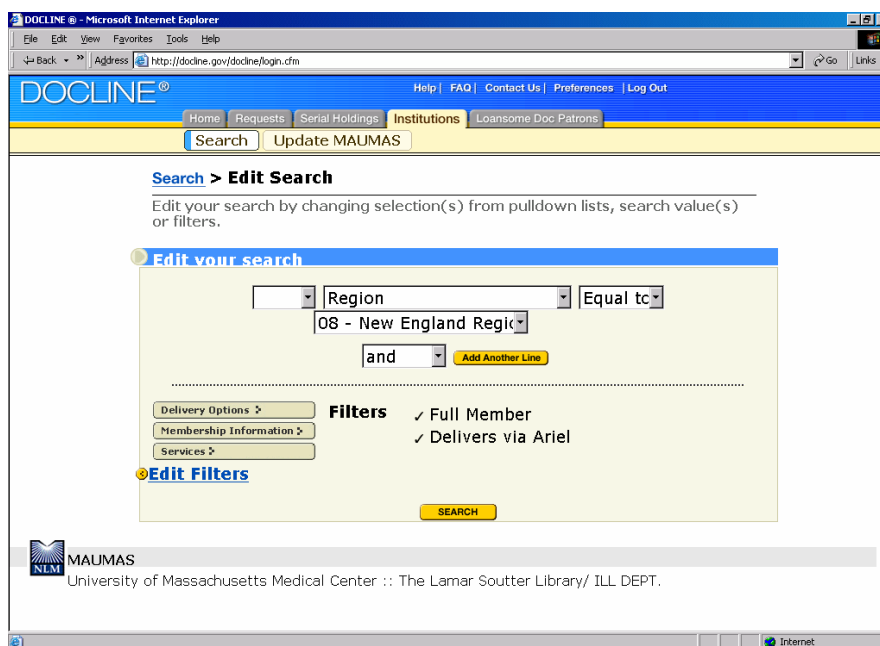


So you decide to modify the search to “fine tune” the results, by clicking “*Edit This Search*” link (upper right corner of screen) -

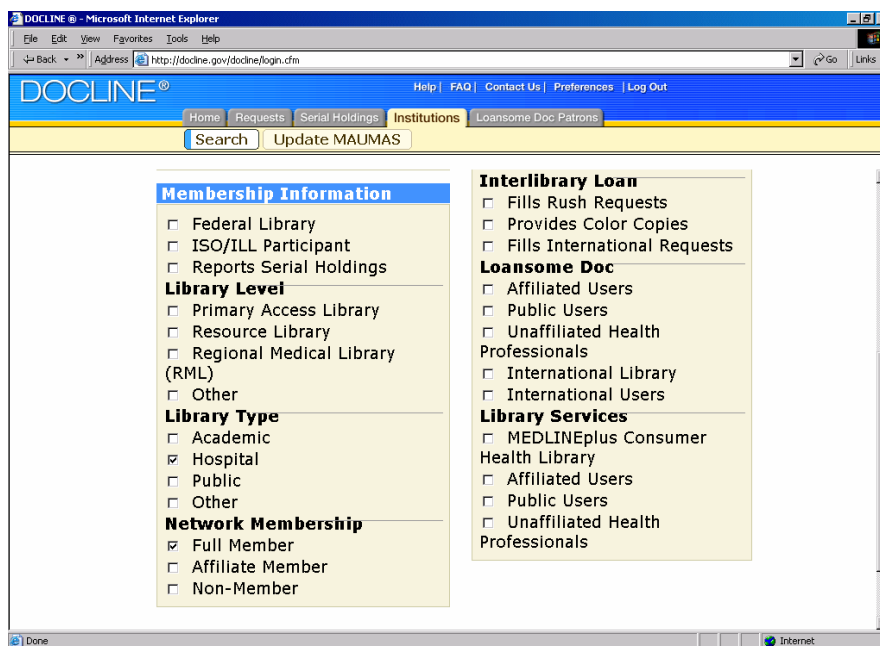


B-5. Modify Your Search Query

Now you click the blue “Edit Filters” link (at the lower left corner of the screen) -



Check “Hospital” filters checkbox, under **Library Type** and click **Add to Search** -



B-5. Modify Your Search Query

You can see the additional filter for “Hospital” has been added to the search strategy -

DOCLINE - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://docline.gov/docline/login.cfm

Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings **Institutions** Loansome Doc Patrons

Search Update MAUMAS

Search > Edit Search

Edit your search by changing selection(s) from pulldown lists, search value(s) or filters.

Edit your search

Region Equal to

08 - New England Regi

and Add Another Line

Delivery Options > Filters

Membership Information >

Services >

✓ Hospital

✓ Full Member

✓ Delivers via Ariel

Edit Filters

SEARCH

MAUMAS

University of Massachusetts Medical Center :: The Lamar Soutter Library/ ILL DEPT.

Done Internet

Click **Search**, and you can see you have narrowed results down to 18 (enough to fit into an open cell in your Routing Table) -

DOCLINE - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://docline.gov/docline/login.cfm

Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings **Institutions** Loansome Doc Patrons

Search Update MAUMAS

Search > Results

Search Criteria: Region equal to **08** **Edit This Search**

Filters: Hospital, Full Member, Delivers via Ariel

View: Institution List **Sorted by:** Institution Name **Results per page:** 25

18 Results **page 1**

LIBID	Institution Name	DOCLINE Status
MAUBMC	Baystate Medical Center Health Sciences Library ILL Springfield, Massachusetts	
MAUBET	Beth Israel Deaconess Medical Center Agoos Medical Library ILL / Baker 101 Boston, Massachusetts	
MAUBOS	Boston University Medical Center Alumni Medical Library Boston, Massachusetts	

Done Internet

B-6. Add Institutions Direct from SearchBuilder to Table

STEP	ACTION: Add Institutions to Routing Table from SearchBuilder
1	On the Search Results page, select the institutions to be added to your Routing Table by clicking in the check box next to the institution name.
2	Scroll to the bottom of the page to the Actions for Selected Institutions area Click Add to Routing Table .
View	A confirmation page displays indicating the institutions about to be added to the Routing Table Workspace and any which could not be added and why. For example, non-DOCLINE libraries cannot be added to a Routing Table. The Workspace is a holding area from which libraries can manage their Routing Table.
3	Click Add and Proceed to Routing Table to add the listed institutions to your Workspace and proceed to your Routing Table for updating. - or - Click Add and Return to Results to add the listed institutions to your Workspace and return to your search results. You can continue searching and adding more institutions to the Workspace or proceed to other tasks. You can access your Routing Table at any time by selecting Institutions, then Update <your LIBID> from the DOCLINE navigation bar. The Workspace is retained even if you log out of DOCLINE. -or- Click Cancel to abandon the action.



Example: Let's search for **FreeShare** libraries in the **Greater Midwest** states that are members of the **NN/LM** network, will provide **RUSH** requests, and support **Ariel** as a delivery method -

B-6. Add Institutions Direct from SearchBuilder to Table

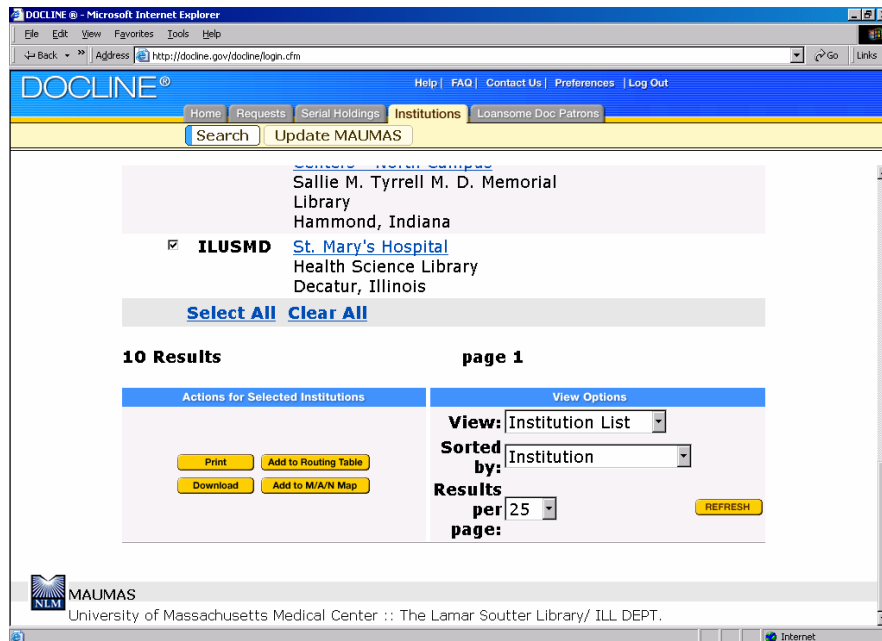
Our search is comprised of 2 lines of search criteria and 3 filters -

Click Search, and we end up with 10 results -

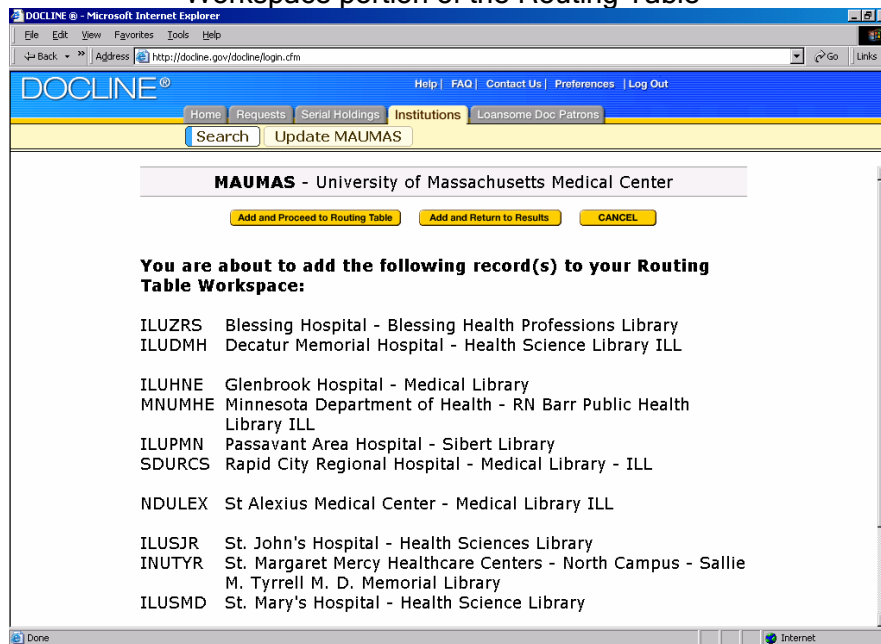
LIBID	Institution Name	DOCLINE Status
ILUZRS	Blessing Hospital Blessing Health Professions Library Quincy, Illinois	
ILUDMH	Decatur Memorial Hospital Health Science Library ILL Decatur, Illinois	
ILUHNE	Glenbrook Hospital Medical Library	

B-6. Add Institutions Direct from SearchBuilder to Table

If we then take our example from the previous page, and click the blue “*Select All*” page link (at the bottom of the list), followed by a click to **Add to Routing Table** –

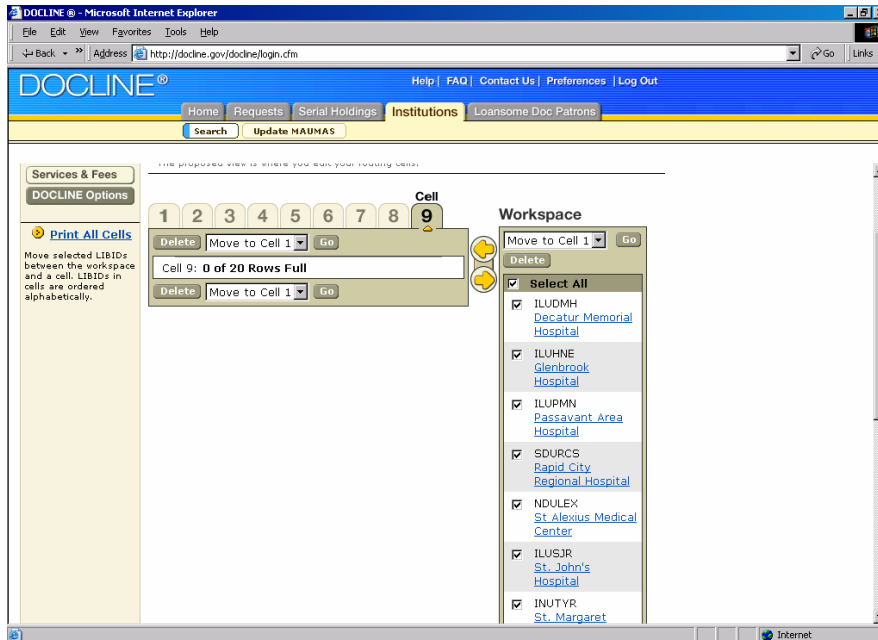


A preview screen pops up, prompting us to verify the selection of records that will be added to the Workspace portion of the Routing Table -

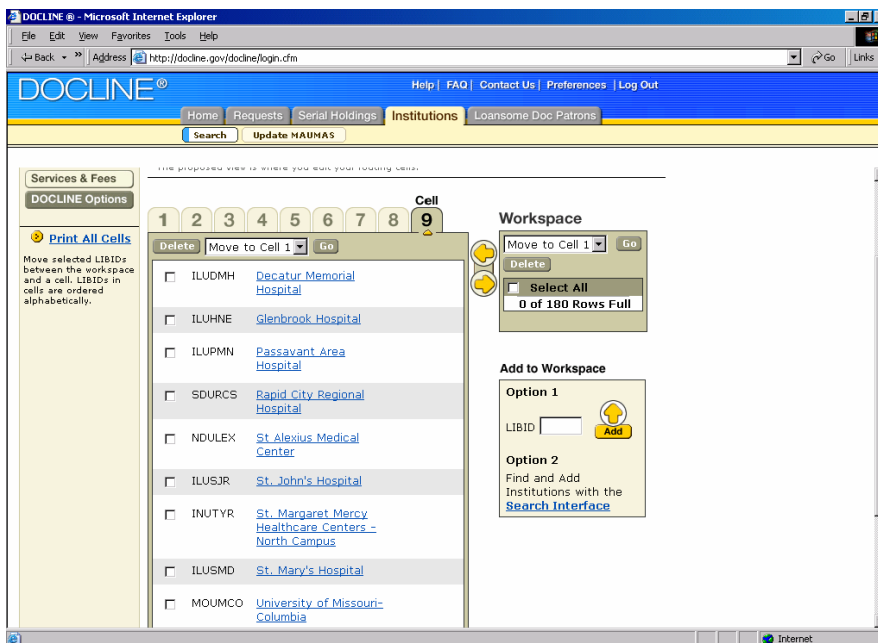


B-6. Add Institutions Direct from SearchBuilder to Table

Click Add and Proceed to Routing Table -

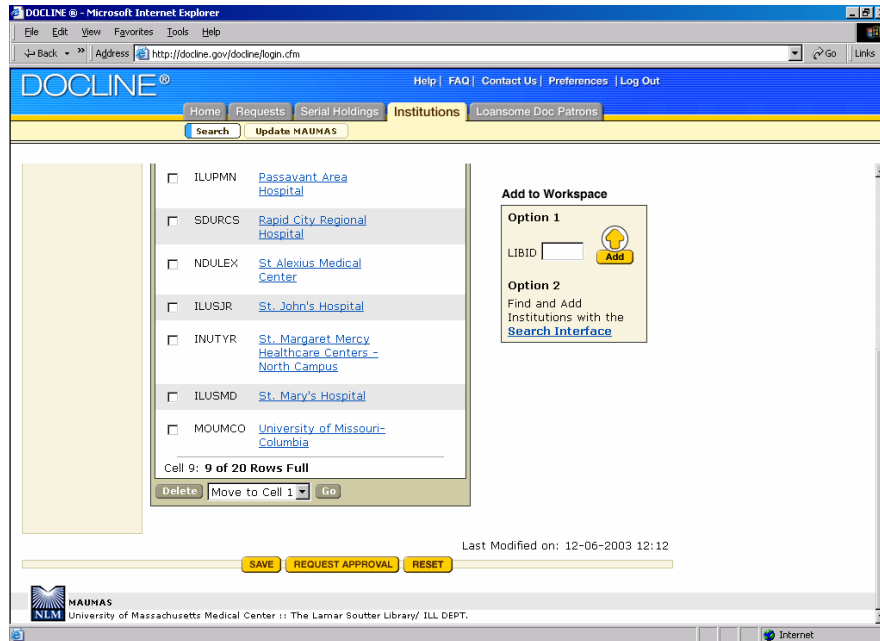


Check **Select All** checkbox in the Workspace box, select a cell (e.g. Cell 9) from the cell tab list, and click the **left yellow arrow** in the Workspace box -

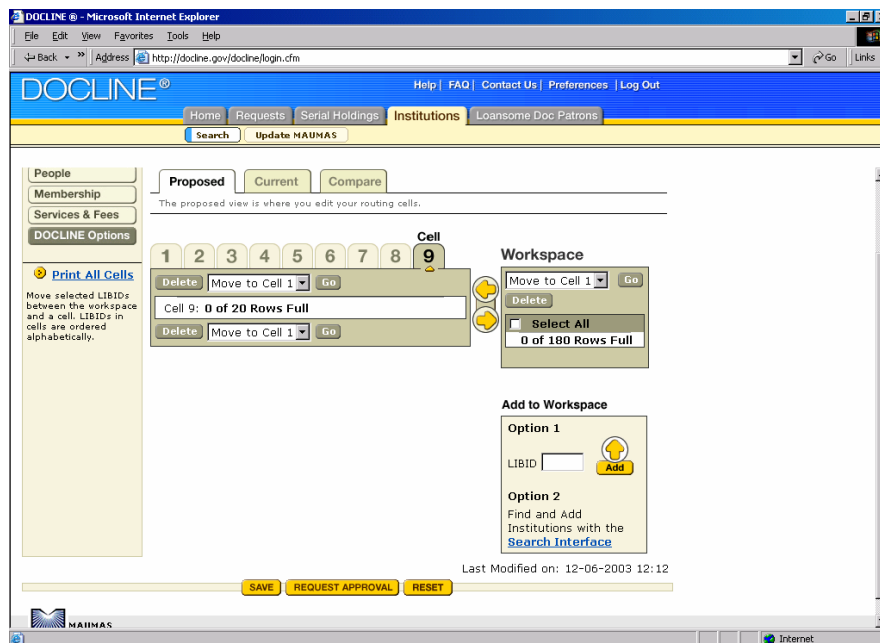


B-6. Add Institutions Direct from SearchBuilder to Table

To incorporate these institutions into the Routing Table, click **Save**. To actually have them “activated” for routing, they still must be approved by your DOCLINE Coordinator for approval. Click **Request Approval** -or- if you change your mind and want to remove them from the Routing Table space, click **Reset** -



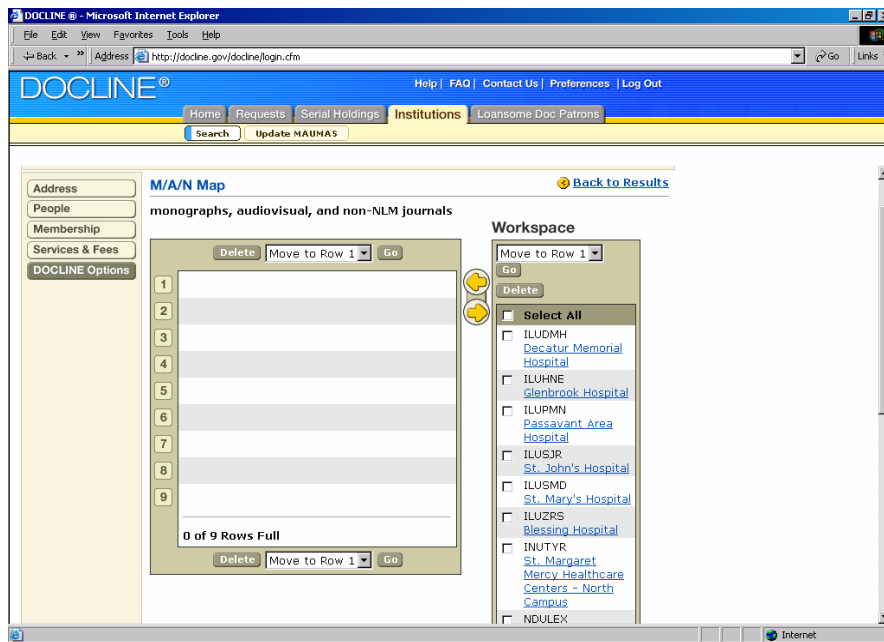
To remove these institutions from the Workspace, click **Select All** and click **Delete** -



B-7. Add Institutions Direct from SearchBuilder to M/A/N Map

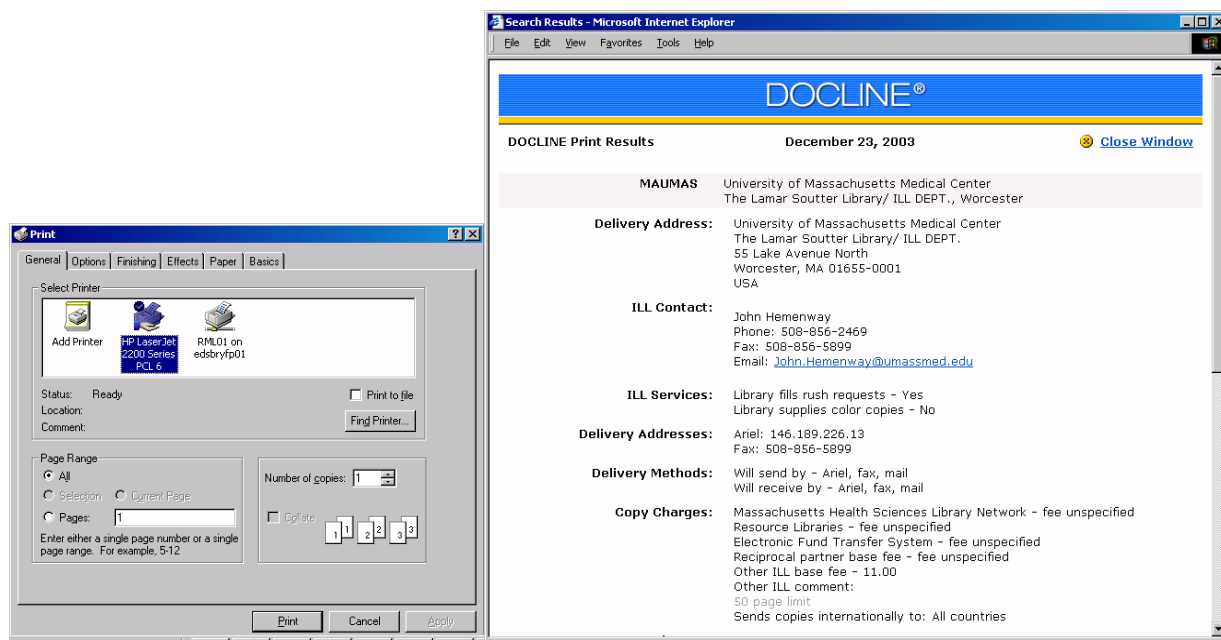
The process is the same as adding to the Routing Table, *except*: [a.] clicking **Add to M/A/N Map**; [b.] the M/A/N Map is comprised of a single cell; and [c.] there is no “Approval” process –

STEP	ACTION: Add Institutions to MAN Map from Search
1	On the Search Results page, select the institutions to be added to your Routing Table by clicking in the check box next to the institution name.
2	Scroll to the bottom of the page to the Actions for Selected Institutions area Click Add to M/A/N Map .
View	A confirmation page displays indicating the institutions about to be added to the Routing Table Workspace and any which could not be added and why. For example, non-DOCLINE libraries cannot be added to a Routing Table. The Workspace is a holding area to manage your Routing Table.
3	Click Add and Proceed to M/A/N Map to add the listed institutions to your Workspace and proceed to your M/A/N Map for updating. -or- Click Add and Return to Results to add the listed institutions to your Workspace and return to your search results. You can continue searching and adding more institutions to the Workspace. You can edit your M/A/N Map at any time by selecting Institutions, then Update <your LIBID> from the DOCLINE navigation bar. The Workspace is retained even if you log out of DOCLINE. -or- Click Cancel to abandon adding institutions to your Routing Table.



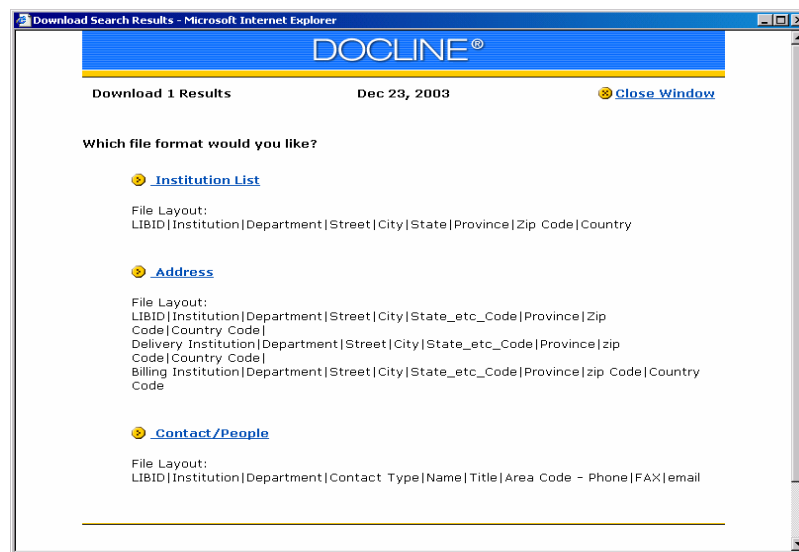
B-8. Print Search Results

STEP	ACTION: Print Search Results
1	On the Search Results page, select the institutions to be printed by clicking in the check box next to the institution name. -or- Select all institutions on the page by clicking the check box in the header bar next to the label LIBID or the clicking Select All at the bottom of the page.
2	Scroll to the bottom of the page to the Actions for Selected Institutions area. Click Print .
View	A new window opens with the selected institutions displayed in the View format of the Search Results page.
3	On the Print dialog window, click Print .
4	Click Close window to close the secondary window.



B-9. Download Search Results

STEP	ACTION: Download Search Results
1	On the “Search Results” page, select the institutions to be downloaded by clicking in the check box next to the institution name . -or- Select all institutions on the page by clicking the check box in the header bar next to the label LIBID -or- by clicking Select All at the bottom of the page.
2	Scroll to the bottom of the page to the Actions for Selected Institutions area. Click Download .
3	On the Download Search Results window, select one of the three information views to download: Institution List Address Contact / People
4	On the “File Download” dialog window, select Save this file to disk and click OK .
5	Choose the location where the file will be saved.
6	Name the file or accept the default name.
7	Click Save .
8	Open the file in Excel and format as desired.



B-10. Update Addresses

STEP	ACTION: Update Addresses
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed. The Address page is displayed.
3	Click in the <i>Institution Address</i> field you wish to edit and make the desired changes.
4	Tab to the next field, or click to any field you wish to edit.
5	Click Save .



Notes:

- The Institution address is used for directory listings (MEDLINEplus Consumer Health Libraries, NN/LM Member database, etc.) The Institution address should reflect the address of the library, not the ILL Department Delivery address.
- The Document Delivery address is the "Ship to:" in DOCLINE which appears on request receipts. The Document Delivery address should reflect the address where articles should be mailed.
- The Billing address is the "Bill to:" in DOCLINE which appears on request receipts. The Billing address should reflect the address where invoices for materials filled by lenders should be mailed.
- Your Internet addresses URLs should begin with "**http://**".

DOCLINE® - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Address http://docline.gov/docline/login.cfm

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings **Institutions** Loansome Doc Patrons

Search Add Manage Users Manage Groups Update MAUMAS

Update > Address [Back to Results](#) [SAVE](#) [RESET](#)

MAUMAS - University of Massachusetts Medical Center

Address

Institution Address required field = * (DIRECTORY LISTING)

Institution * University of Massachusetts Medical Center

Library The Lamar Soutter Library/ ILL DEPT.

Street * 55 Lake Avenue North

City * Worcester

State/Province : **Massachusetts**

Zip/Mail Code * 01655-0001 US: enter ZIP + 4

Country : **USA**

County Worcester

Phone * 1 508 856-2511 Ext.

Delivery Info

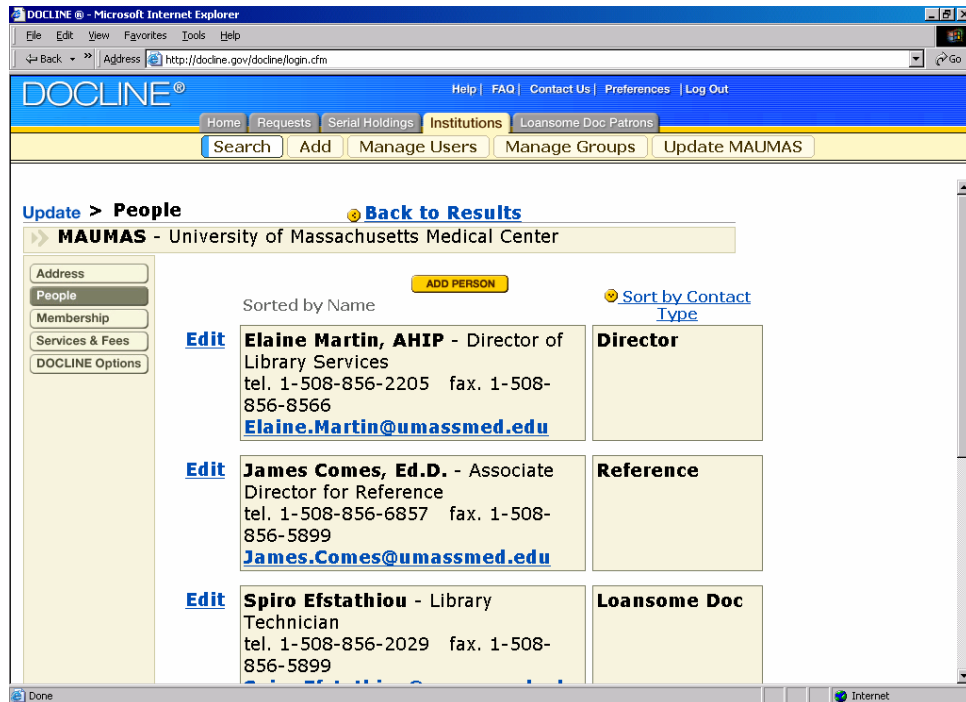
Will receive **Document Delivery Address** (SHIP TO)

Done Internet

B-11. Update People (Contacts)

STEP	ACTION: Add People Contacts
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click People on the Institution Navigation bar.
4	Click Add People .
View	The Add New Contact Person page is displayed.
5	Enter the person's contact info. Fields marked by an asterisk are required.
6	Select role(s) the person performs by checking corresponding Contact Type.
7	Click Save .

Click **People** (in the left column) and either: [a.] click the blue **Edit** page link –or– **Add Person** -



Up B-11. Update People (Contacts)

STEP	ACTION: Remove People Contacts
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click People on the Institution Navigation bar.
4	Click the Edit link next to the contact to be modified.
View	The contact person's record is displayed.
5	Click Delete Person .
6	On the Delete Confirmation page, click Yes . -or- Click Cancel to abandon the action.

STEP	ACTION: Update People Contacts
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click People on the Institution Navigation bar.
4	Click the Edit link next to the contact to be modified.
View	The contact person's record is displayed.
5	Modify the person's contact information. Fields marked by asterisk required.
6	Modify which role(s) the person performs by checking the corresponding Contact Type.
7	Click Save .

B-12. Manage Importing / Exporting Serial Holdings

The Membership page includes the data elements that describe an institution's NN/LM and DOCLINE membership. Most of the Membership page fields can only be edited by your regional DOCLINE coordinator or by NLM. To request a change to any of the "read-only" elements -- contact your DOCLINE Coordinator.

To authorize NLM to export your DOCLINE serial holdings data to OCLC, or update your DOCLINE Serial Holdings from imported data, do the following:

STEP	ACTION: Elect Batch Authorization Update
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Membership on the Institution Navigation bar.
4	Click Serial Holdings on the Institution Navigation bar. -or- Scroll down to the "Serial Holdings" area.
5	Select one of the options in the Batch Authorization Update list box <ul style="list-style-type: none"> ▪ No Authorization Given ▪ Send Holdings to OCLC ▪ Update Holdings from OCLC
6	Verify your OCLC Symbol.
7	Click Save .



Notes:

- A single unique OCLC symbol is required when **Send Holdings to OCLC** is selected.
- One or more OCLC symbols are required when **Update Holdings from OCLC** is selected.
- For additional information about Batch Update Authorization programs for Serials, please contact your DOCLINE Coordinator.

B-12. Manage Importing / Exporting Serial Holdings

Click **Membership** (from left column) -

The screenshot shows the DOCLINE web application in Microsoft Internet Explorer. The browser address bar shows <http://docline.gov/docline/login.cfm>. The DOCLINE logo is at the top left, and navigation links (Home, Requests, Serial Holdings, Institutions, Loansome Doc Patrons) are at the top right. Below the navigation bar is a search bar and buttons for Add, Manage Users, Manage Groups, and Update MAUMAS.

The main content area is titled "Update > Membership" with a "Back to Results" link and "SAVE" and "RESET" buttons. The left sidebar contains a menu with "Address", "People", and "Membership" (selected). Under "Membership", there are links for "NN/LM Membership", "DOCLINE Membership", "Serial Holdings", "Organization ID", "Services & Fees", and "DOCLINE Options".

The "Membership" form is for "MAUMAS - University of Massachusetts Medical Center". It includes a "required field = *" label. The form fields are:

- Region Code: **08 - New England Region**
- Library Type: **Academic**
- Library Level: **Regional Medical Library**
- NN/LM Membership: **Full Member**
- Date Joined: **03-06-2002** (format: MM-DD-YYYY)
- Renewal Date: **03-06-2002** (format: MM-DD-YYYY)
- Library Closed: ☐ Yes ☒ No
- Closed Update Date: **03-06-2002** (format: MM-DD-YYYY)
- Date Library Closed: **03-06-2002** (format: MM-DD-YYYY)
- Merged with LIBID: ☐ Yes ☒ No
- Federal Library: ☐ Yes ☒ No
- Library Groups: **MAHSLIN, RESOURCE, EFTS**

There is an "Add/Delete Groups" button next to the Library Groups field. Below the form is a section for "DOCLINE Membership" with fields for "DOCLINE Participant" (radio buttons for Yes/No) and "Current DOCLINE Status" (radio buttons for Active/Inactive).

Click drop-down arrow list box to select Batch Update Authorization program -

The screenshot shows the DOCLINE web application in Microsoft Internet Explorer. The browser address bar shows <http://docline.gov/docline/login.cfm>. The DOCLINE logo is at the top left, and navigation links (Home, Requests, Serial Holdings, Institutions, Loansome Doc Patrons) are at the top right. Below the navigation bar is a search bar and buttons for Add, Manage Users, Manage Groups, and Update MAUMAS.

The main content area is titled "Serial Holdings" and "Organization ID". The "Serial Holdings" section includes a table with the following data:

Number of Holdings	Level 2	Level 3	Total
27	5255	5282	

Below the table is an "Update History" section with the following data:

Update History	Type	Update ID	Update Date
Batch	UCMP	MAS63	02-23-2000
Online			12-18-2003

Below the update history is a "Batch Update Authorization" section with a drop-down arrow list box showing "No Authorization Given". Below this is a "Batch Authorization Date" field showing "01-01-2001" and a "Holdings Last Reviewed" field showing "01-01-2001" (format: MM-DD-YYYY).

The "Organization ID" section includes fields for:

- Federal Employer Identification Number (FEIN)
- OCLC Symbol 1: **WQM**
- OCLC Symbol 2
- OCLC Symbol 3
- MARC Organization Code
- ID Comments

At the bottom of the page, it says "Last Modified on: 11-18-1999 17:11".

B-13. Review Serial Holdings

DOCLINE participants are required to maintain accurate serial holdings. Libraries can update individual holdings records in DOCLINE, import their holdings from OCLC or a MARC 21 file, or indicate the accuracy of their holdings through an annual review.

To indicate that an institution has reviewed their serial holdings and that they are accurate, do the following:

STEP	ACTION: Record Serial Holdings Reviewed Date
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Membership on the Institution Navigation bar.
4	Click Serial Holdings on the Institution Navigation bar. -or- Scroll down to the "Serial Holdings" area.
5	Enter the date on which your institution completed reviewing their serial holdings.
6	Click Save .

Institution Record

B-14. Modify Institution IDs (OCLC, FEIN, MARC)

STEP	ACTION: Modify Institution ID'S
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Membership on the Institution Navigation bar.
4	Click Organization ID on the Institution Navigation bar. -or- Scroll down to the "Organization ID" area.
5	Click in the organization ID field you wish to edit and make the desired changes.
6	Modify comments explaining IDs.
7	Click Save .

DOCLINE @ - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Address http://docline.gov/docline/ogn.cfm Go

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings **Institutions** Loansome Doc Patrons

Search Add Manage Users Manage Groups Update MAUMAS

Batch	UCMP	02-23-2000
Online	MAS63	12-18-2003

Batch Update Authorization: No Authorization Given

Batch Authorization Date: 01-01-2001

Holdings Last Reviewed: MM-DD-YYYY

Organization ID

Federal Employer Identification Number (FEIN):

OCLC Symbol 1: WQM

OCLC Symbol 2:

OCLC Symbol 3:

MARC Organization Code:

ID Comments:

SAVE RESET

Last Modified on: 11-18-1999 17:11

NLM MAUMAS University of Massachusetts Medical Center :: The Lamar Soutter Library/ ILL DEPT.

B-15. Modify Interlibrary Loan Service Options

STEP	ACTION: Modify ILL Service Options
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Services & Fees on the Institution Navigation bar.
4	Modify the ILL services values by clicking the appropriate radio button.
5	Enter comments about your institution's ILL services.
6	Click Save .



Notes:

- To change the "Participates in EFTS" value, contact your DOCLINE Coordinator -

DOCLINE @ - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://docline.gov/docline/login.cfm

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home | Requests | Serial Holdings | **Institutions** | Loansome Doc Patrons

Search | Add | Manage Users | Manage Groups | Update MAUMAS

Update > Services & Fees [Back to Results](#) [SAVE](#) [RESET](#)

MAUMAS - University of Massachusetts Medical Center

Address
People
Membership
Services & Fees
ILL Services
Copy Services and Fees
Loan Services and Fees
Loansome Doc Services
Other Services
DOCLINE Options

ILL Services

Participates in EFTS ☒ Yes ☐ No
Date Joined EFTS 01-24-1996 MM-DD-YYYY
Provides Color Copies ☐ Yes ☒ No
Fills Rush Request ☐ Yes ☒ No
Service Comments

required field = *

Copy Services and Fees

Copy Base Fees

Borrower Group	Base Fee	Comments
MAHSLIN	\$	Fees vary. Participants agree to invoice and pay electronically through EFTS.
RESOURCE	\$	
EFTS	\$	

Delivery Info

B-16. Modify Copy Service Options and Fees

STEP	ACTION: Modify Copy Service Options / Fees
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Services & Fees on the Institution Navigation bar.
4	Click Copy Services and Fees on the Institution Navigation bar. -or- Scroll down to the <i>Copy Services and Fees</i> area.
View	The library groups your library is a member of will display with their associated charges and comments. Direct questions or changes about library groups to your RML.
5	Modify your base fee charge for reciprocal ILL partners and enter any comments.
6	Modify your base fee charge for other ILL borrowers and enter any comments.
7	Add any surcharges your library adds to its base fee for specific services or conditions. Select the surcharge type from the pull down list and click Add Surcharge . Enter the surcharge amount and explanatory comments. For example "2 hour service, Mon-Fri 8am - 3pm EST"
8	Indicate whether your library provides copy service to international libraries by checking the Yes or No radio button. If you select Yes , indicate to which countries you provide service. If you choose Selected Countries, press Add/Delete Countries. Select the countries served in the Countries popup window and click Save .
9	Click Save .

B-16. Modify Copy Service Options and Fees

To change Copy Base Fees, add the appropriate numbers to the dollar fields and click **Save** -

DOCLINE - Microsoft Internet Explorer

Address: http://dodine.gov/dodine/login.cfm

Help | FAQ | Contact Us | Preferences | Log Out

Home | Requests | Serial Holdings | **Institutions** | Loansome Doc Patrons

Search | Add | Manage Users | Manage Groups | Update MAUMAS

Doc Services
Other Services
DOCLINE Options

Delivery Info

Will receive by:

Mail - Yes
Fax - Yes
1-508-856-5899

Ariel - Yes
Primary - 146.189.226.13

Email (PDF) - No

Copy Services and Fees

Copy Base Fees

Borrower Group	Base Fee	Comments
MAHSLIN	\$	
RESOURCE	\$	
EFTS	\$	
Reciprocal Partner	\$	
Other ILL	\$ 11.00	50 page limit

Copy Surcharges

Surcharge Type	Surcharge	Comments
Fax	\$ 19.00	

Select Value [Add Surcharge](#)

Sends Copies to International Libraries?

To add Copy Surcharges, click the **Value** drop-down list box, select a value, and click **Add Surcharge** -

DOCLINE - Microsoft Internet Explorer

Address: http://dodine.gov/dodine/login.cfm

Help | FAQ | Contact Us | Preferences | Log Out

Home | Requests | Serial Holdings | **Institutions** | Loansome Doc Patrons

Search | Add | Manage Users | Manage Groups | Update MAUMAS

Doc Services
Other Services
DOCLINE Options

Delivery Info

Will receive by:

Mail - Yes
Fax - Yes
1-508-856-5899

Ariel - Yes
Primary - 146.189.226.13

Email (PDF) - No

Email (TIFF) - No

Web (PDF) - No

Web (TIFF) - No

Copy Services and Fees

Copy Base Fees

Borrower Group	Base Fee	Comments
MAHSLIN	\$	
RESOURCE	\$	
EFTS	\$	
Reciprocal Partner	\$	
Other ILL	\$ 11.00	50 page limit

Copy Surcharges

Surcharge Type	Surcharge	Comments
Fax	\$ 19.00	

Select Value [Add Surcharge](#)

Sends Copies to International Libraries?

Books

Will Loan: ☒ Yes ☐ No Base Fee: ☐ Yes ☒ No Loan Period: ☐ Yes ☒ No

Comments: No audiovisual loans

B-17. Modify Loan Service Options and Fees

STEP	ACTION: Modify Loan Service Options/Fees
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Services & Fees on the Institution Navigation bar.
4	Click Loan Services and Fees on the Institution Navigation bar. -or- Scroll down to the <i>Loan Services and Fees</i> area.
5	For Audio/Visual, Books, and Journals, indicate whether or not your library will loan these material types by checking either Yes or No . <ul style="list-style-type: none"> • If Yes, indicate whether your library will renew loans for these material types. • If Yes to Loans, indicate your library's base fee and loan period. • If Yes to Renewals, indicate your library's renewal period.
6	For Audio/Visual, Books, and Journals, enter any comments explaining services and/or fees.
7	Add any surcharges your library adds to its base fee for specific services or conditions. Select the surcharge type from the pull down list and click Add Surcharge . Enter the surcharge amount and explanatory comments. For example "2 hour service, Mon-Fri 8am - 3pm EST".
7	Indicate whether your library provides loan service to international libraries by checking the Yes or No radio button. If you select Yes, indicate to which countries you provide service. If you choose Selected Countries, click Add/Delete Countries . Select the countries served in the Countries popup window and click Save .
8	Click Save .

B-17. Modify Loan Service Options and Fees

To change Loan Services and Base Fees, add to the appropriate fields and click **Save** -

DOCLINE - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://docline.gov/docline/login.cfm

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings **Institutions** Loansome Doc Patrons

Search Add Manage Users Manage Groups Update MAUMAS

Loan Services and Fees

Loan Services and Base Fees

Audio/Visual

Will Loan: ☐ Yes ☒ No Base Fee Loan Period

Comments No audiovisual loans

Books

Will Loan: ☒ Yes ☐ No Base Fee Loan Period Will Renew: ☐ Yes ☒ No

\$ 11.00 35 days days

Comments

Journals

Will Loan: ☐ Yes ☒ No Base Fee Loan Period

Comments No loans

Loan Surcharges

Surcharge Type Surcharge Comments

To add Loan Surcharges, click the **Value** drop-down list box, select a value, and click **Add Surcharge** -

DOCLINE - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://docline.gov/docline/login.cfm

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings **Institutions** Loansome Doc Patrons

Search Add Manage Users Manage Groups Update MAUMAS

record

\$ 11.00 35 days days

Comments

Journals

Will Loan: ☐ Yes ☒ No Base Fee Loan Period

Comments No loans

Loan Surcharges

Surcharge Type Surcharge Comments

Select Value

Select Value

Citation Verification / Correction

International

Out of State/Region

For Profit Organization

Rush

Add Surcharge

Loansome Doc Services

Loansome Doc Provider ☒ Yes ☐ No

B-17. Modify Loan Service Options and Fees

STEP	ACTION: Modify Loansome Doc Service Options
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Services & Fees on the Institution Navigation bar.
4	Click Loansome Doc Services on the Institution Navigation bar. -or- Scroll down to the <i>Loansome Doc Services</i> area.
5	Indicate whether your library is a Loansome Doc provider by checking Yes or No .
6	Indicate to which user populations your library provides Loansome Doc service by checking the box under <i>Provides</i> (Checked = Yes).
7	Indicate whether your library charges for Loansome Doc service for each of the user populations by checking the box under <i>Charges</i> (Checked = Yes).
8	Enter comments about your institution's Loansome Doc services.
9	If your library provides service to users residing in an international country, indicate to which countries you provide service. If you choose Selected Countries, click Add/Delete Countries . Select the countries served in the Countries popup window and click Save .
10	Click Save .

B-18. Modify Loansome Doc Service Options and Fees

To change Loansome Doc Services, check the appropriate boxes and click **Save** -

Loansome Doc Services

Loansome Doc Provider ☒ Yes ☐ No

(Check All That Apply)

	Provides	Charges
Affiliated Users	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Unaffiliated Health Professionals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Public	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
International Libraries	<input type="checkbox"/>	<input type="checkbox"/>
International Users	<input type="checkbox"/>	<input type="checkbox"/>

Loansome Doc Comments

Serves International Users Who Reside In:
☐ All Countries ☒ Selected Countries

Other Services

To add Other Services, check the appropriate boxes and click **Save** -

Other Services

Authorizes listing in MEDLINEplus [Consumer Health Libraries Directory](#)
☒ Yes ☐ No

	For Affiliated Users		For Unaffiliated Health Professionals		For Public	
(Check All That Apply)	Provides	Charges	Provides	Charges	Provides	Charges
Internet Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mediated Searching	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Onsite Collection Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Online Search Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reference Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments

SAVE **RESET**

Last Modified on: 12-12-2003 11:12

MAUMAS
 University of Massachusetts Medical Center :: The Lamar Soutter Library/ ILL DEPT.

B-19. Modify Library Service Options

STEP	ACTION: Modify Library Service Options
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed..
3	Click Services & Fees on the Institution Navigation bar.
4	Click Other Services on the Institution Navigation bar. -or- Scroll down to the <i>Other Services</i> area.
5	Indicate whether your library provides the listed services for each of the user populations (Checked = Yes).
6	Indicate whether your library charges for each listed service for each of the user populations by checking the box under <i>Charges</i> (Checked = Yes).
7	Enter comments about your institution's library services.
8	Click Save .

B-20. Set Defaults to Route New Requests

STEP	ACTION: Set Default Values for Borrow Requests
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Select the default <i>Form</i> of your requests: Copy, Color Copy, or Original (Loan).
5	Select the default method of <i>Copyright Compliance</i> : Guidelines or Law.
6	Enter the default <i>Maximum Cost</i> willing to be paid for ILL material. Enter a numeric value. If you need the material free of cost, enter "0.00". Select "Any cost" if your library is willing to pay any amount for ILL material.
7	Enter the default authorization for ILL material in the <i>Authorized by</i> field.
8	Select the default <i>Network Delivery Method</i> .
9	Select the default <i>NLM Delivery Method</i> .
10	Enter the default <i>Comments to Lenders</i> to display on DOCLINE Receipts.
11	In the <i>Serial Routing</i> area, indicate the default routing instructions for serials including your <i>Routing Table Default Cells</i> , whether to <i>Route to Resource Libraries</i> , whether to <i>Route to NLM</i> , and whether to <i>Route Beyond NLM</i> .
12	Click Save .

B-20. Set Defaults to Route Requests

To change Borrowing Preferences, fill in the appropriate information and click **Save** -

DOCLINE - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://docline.gov/docline/login.cfm

DOCLINE Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings Institutions Loansome Doc Patrons

Search Add Manage Users Manage Groups Update MAUMAS

Update > DOCLINE Options Back to Results SAVE RESET

MAUMAS - University of Massachusetts Medical Center

Address
People
Membership
Services & Fees
DOCLINE Options

Borrowing Preferences
Delivery Methods
Additional Software

Edit Routing Table
Edit

Borrowing Preferences required field = *

Select borrowing and routing preferences for new requests.

Form Copy

Copyright Compliance Guidelines

Maximum Cost \$22.00 OR Any cost

Authorized By

Network Delivery Method Mail

NLM Delivery Method Mail

Comments to Lenders

Serial Routing

Routing Table Default 1 2 3 4 5 6 7 8

To change Serial Routing Options: click the appropriate boxes and radio buttons, then click **Save** -

DOCLINE - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://docline.gov/docline/login.cfm

DOCLINE Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings Institutions Loansome Doc Patrons

Search Update MAUMAS

Table

Edit M/A/N Map

Serial Routing

Routing Table Default 1 2 3 4 5 6 7 8

Cells 9

Refer to Resource Libraries Yes No

Route to NLM Yes No

Route Beyond NLM Yes No

Edit Routing Table

Monographs, Audiovisuals, and Non-NLM Journal Routing

1)
2)
3)
4)

B-20. Set Defaults to Route Requests

At the current time, there are no Additional Software Options available. Future systems development at the National Library of Medicine will include the implementation of DOCLINE interfaces to third party ILL management software packages, based on the ISO/ILL protocol.

The screenshot shows a web browser window titled "DOCLINE @ - Microsoft Internet Explorer". The address bar shows "http://docline.gov/docline/login.cfm". The page has a blue header with the "DOCLINE" logo and navigation links: "Home", "Requests", "Serial Holdings", "Institutions", and "Loansome Doc Patrons". Below the header is a yellow navigation bar with buttons: "Search", "Add", "Manage Users", "Manage Groups", and "Update MAUMAS".

The main content area is titled "Worcester, MA 01655-0001" and features a yellow "Edit Settings" button. The form is divided into two sections:

Send by:

Mail :Yes					
Ariel	<input checked="" type="radio"/> Yes	<input type="radio"/> No	Email	<input checked="" type="radio"/> Yes	<input type="radio"/> No
			PDF	<input type="radio"/> Yes	<input checked="" type="radio"/> No
FAX	<input checked="" type="radio"/> Yes	<input type="radio"/> No	Email	<input checked="" type="radio"/> Yes	<input type="radio"/> No
			TIFF	<input type="radio"/> Yes	<input checked="" type="radio"/> No
			Web	<input type="radio"/> Yes	<input checked="" type="radio"/> No
			TIFF	<input type="radio"/> Yes	<input checked="" type="radio"/> No

Additional Software Options

ISO/ILL Protocol ☐ No

Third Party :

Products

Add/Delete Products

Last Modified on: 03-27-2001 09:03

SAVE **RESET**

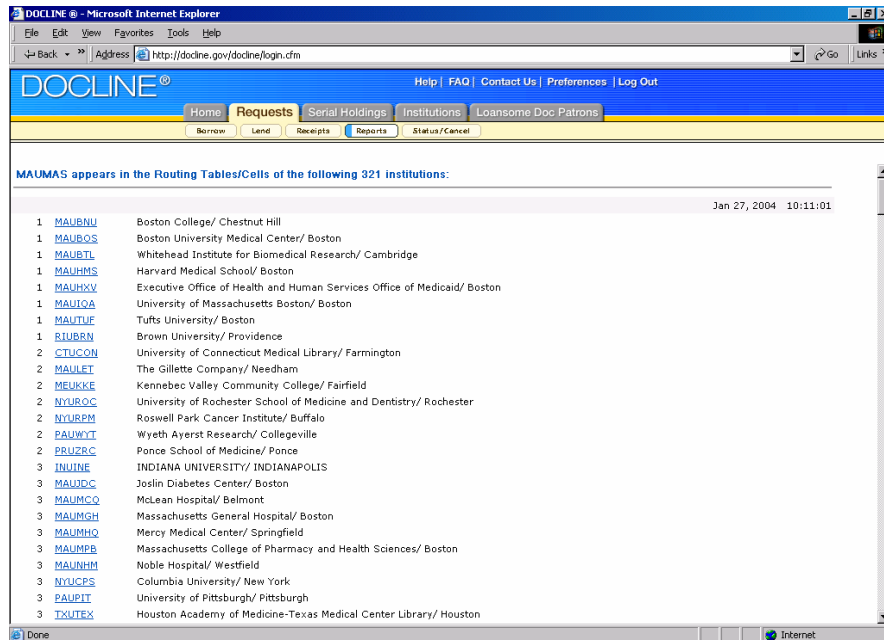
MAUMAS
University of Massachusetts Medical Center :: The Lamar Soutter Library/ ILL DEPT.

Institution Record

B-21. View Institutions with Your LIBID in Their Routing Table

STEP	ACTION: Viewing Report 1-7
1	On the DOCLINE navigation bar, select Requests .
View	Your library's list of available reports is displayed.
2	Click on the “ <i>Routing table and M/A/N Map cells containing my LIBID</i> ” link.

For example, according to the latest “*Library Routing table and M/A/N Map cells containing my LIBID*” Report, there are 321 institutions that have the Regional Library (Lamar Soutter) in their Routing Table -



B-22. Modify Delivery Methods

STEP	ACTION: Modify Delivery Methods
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click Delivery Methods on the Institution Navigation bar. -or- scroll down to the <i>Delivery Methods</i> area.
5	In the <i>Receive</i> by area, indicate by which delivery methods your library can receive ILL material.
6	Enter a delivery address for each Receive by delivery method .
7	In the <i>Send</i> by area, indicate which delivery methods your library can receive.
8	Click Save .

To change Delivery Methods: click the appropriate radio buttons, enter the appropriate information, and click **Save** -

DOCLINE © Microsoft Internet Explorer
 File Edit View Favorites Tools Help
 Address http://docline.gov/docline/ogn.cfm
 Help | FAQ | Contact Us | Preferences | Log Out
 Home Requests Serial Holdings **Institutions** Loansome Doc Patrons
 Search Add Manage Users Manage Groups Update MAUMAS

Delivery Methods

Receive by:

Mail : **Yes**
 Ariel ☐ Yes ☐ No Email ☐ Yes ☐ No PDF ☐ Yes ☐ No
 FAX ☐ Yes ☐ No Email ☐ Yes ☐ No Web ☐ Yes ☐ No
 No TIFF No TIFF No

Ariel Address 146.189.226.13
 Alternate Ariel Address
 Email Address (For Email & Web)
 FAX 1 508 856-5899
 Country Area Number

Document Delivery **University of Massachusetts**
 (Mail) **Medical Center**
The Lamar Soutter Library/ ILL
DEPT.
55 Lake Avenue North
Worcester, MA 01655-0001

B-23. Update Your Routing Table

The Routing Table is the grouped list of institutions to which your serial requests will route, if the library reports owning the request volume or year and supports the requested delivery method. The institutions listed are your primary lending partners.

The Routing Table is comprised of nine (9) cells, each of which can contain up to twenty (20) libraries. The order of routing is sequential from Cell 1 through Cell 9. All libraries within a cell are evaluated for routing a request before the routing algorithm moves to the next cell of libraries. Routing within a cell is random to provide a degree of load balancing. Since routing within a cell is random, institutions are displayed in alphabetical order in the Routing Table. There is no "position" within a cell which determines routing order.

The Workspace is a holding area for institutions being added or moved as libraries work on modifying their Routing Table over a period of time.

Strategies for setting up Routing Tables vary from region to region

For cells 1 through 3: Use these for consortia members and local libraries for which you have a reciprocal borrowing/lending agreements. Cell 1 should be reserved for libraries with fewer than 100 titles in SERHOLD, and cells 2 and 3 for libraries with between 100-200 titles in SERHOLD. Place heavily utilized libraries of a consortium in cells 2 and 3, allowing DOCLINE to search the smaller institutions first. If you are a member of BHSL, the suggested cell placement for Level 2 BHSL is cell 2; for Level 3 BHSL, cell 3; and so forth. Cell 1 is for your local consortium and Level 1 BHSL libraries (i.e., libraries that have not submitted statistics for the previous year.)

For cells 4 through 6: Use these for non-consortium members with which you have a reciprocal agreements or libraries with more than 300 titles in SERHOLD. . If you are a member of BHSL, the suggested cell placement for Level 4 BHSL is cell 4; for Level 5 BHSL, cell 5; and so forth.

For cells 7 and 8: Use these for specialized libraries and Resource Libraries, placing those in geographic proximity to your institution in cell 7. For BHSL, Level 7 libraries should be placed in cell 7, before the placement of Resource Libraries. Unless they are in your local consortium Level 8, BHSL libraries should be prefixed only and should be used for unique materials.

For cell 9: Use this cell for very large Resource Libraries.

Your DOCLINE coordinator can provide valuable guidance for managing your Routing Table.

B-23. Update Your Routing Table

STEP	ACTION: Add Lending Libraries
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit Routing Table link on the Institution Navigation bar.-or- Click Edit Routing Table in the <i>Serial Routing</i> area of the DOCLINE Options page.
View	Your "Proposed" Routing Table and its associated Workspace displays. The Proposed tab allows you to edit your Routing Table and consists of your Routing Table currently in use by DOCLINE for routing plus any changes you have made (additions, deletions, moves). The Workspace contains any libraries which you have added from Institution Search, added via <i>Add to Workspace</i> on this page, or previously moved from the current Routing Table .
5	(Optional) In the <i>Add to Workspace</i> area, enter a valid LIBID and press Add . The institution is added to the Workspace.
6	<p>In the Proposed Routing Table, click on the numbered tab corresponding to the cell to which you want to add an institution.</p> <p>In the Workspace: select the library or libraries to add to that cell by checking the box next to the institution name.</p> <p>Click the left pointing arrow pointing from the Workspace to the Routing Table -or-</p> <p>In the Workspace: select the library or libraries to add by checking the box next to the institution name. Select "Move to Cell #" from the list box and click Go.</p>
7	To add more institutions, repeat Steps 5-6.
8	Click Save .
9	Click Request Approval once all changes have been made. This notifies your RML to review your Routing Table changes. The message "Routing table is awaiting approval" will appear in your Activity and Status area of the Home page.

B-23. Update Your Routing Table

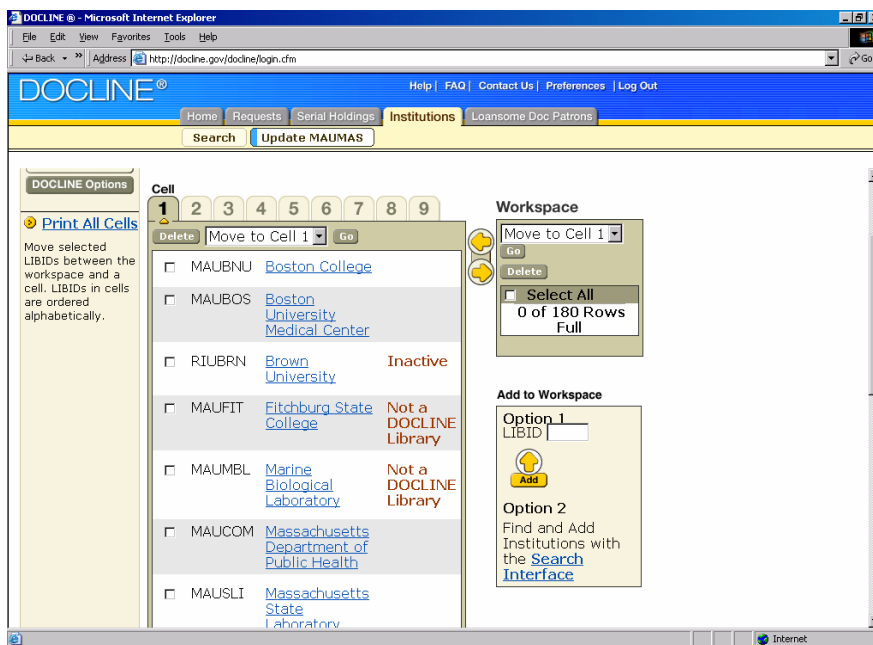


Tip: Institutions can be moved into the Workspace for later use. Just as with the Routing Table, remember to **Save** when adding, deleting, or moving libraries into or out of the Workspace before leaving the *Update Routing Table* page.

STEP	ACTION: Remove Lending Libraries
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit Routing Table link on the Institution Navigation bar. -or- Click Edit Routing Table in the <i>Serial Routing</i> area of the DOCLINE Options page.
View	Your "Proposed" Routing Table and its associated Workspace displays. The Proposed tab allows you to edit your Routing Table and consists of your Routing Table currently in use by DOCLINE for routing plus any changes you have made (additions, deletes, moves). The Workspace contains any libraries which you have added from Institution Search, added via <i>Add to Workspace</i> on this page, or previously moved from the current Routing Table .
5	In the Proposed Routing Table, click on the cell number which contains the institution to be removed.
6	Select the institution(s) to be deleted by clicking the checkbox next to the institution name.
7	Click the right pointing arrow to move the institution to the Workspace for later use -or- Click Delete .
8	To remove additional libraries, repeat Step 5-7.
9	Click Save .
10	Click Request Approval once all changes have been made. This notifies your RML to review your Routing Table changes. The message "Routing table is awaiting approval" will appear in your Activity and Status area of the Home page.

B-23. Update Your Routing Table

To edit the Routing Table, you can navigate by Route A (Institutions | Update xxxxxx | Edit Settings Edit Routing Table) –or– by Route B (Institutions | Update xxxxxx | DOCLINE Options | Serial Options) -



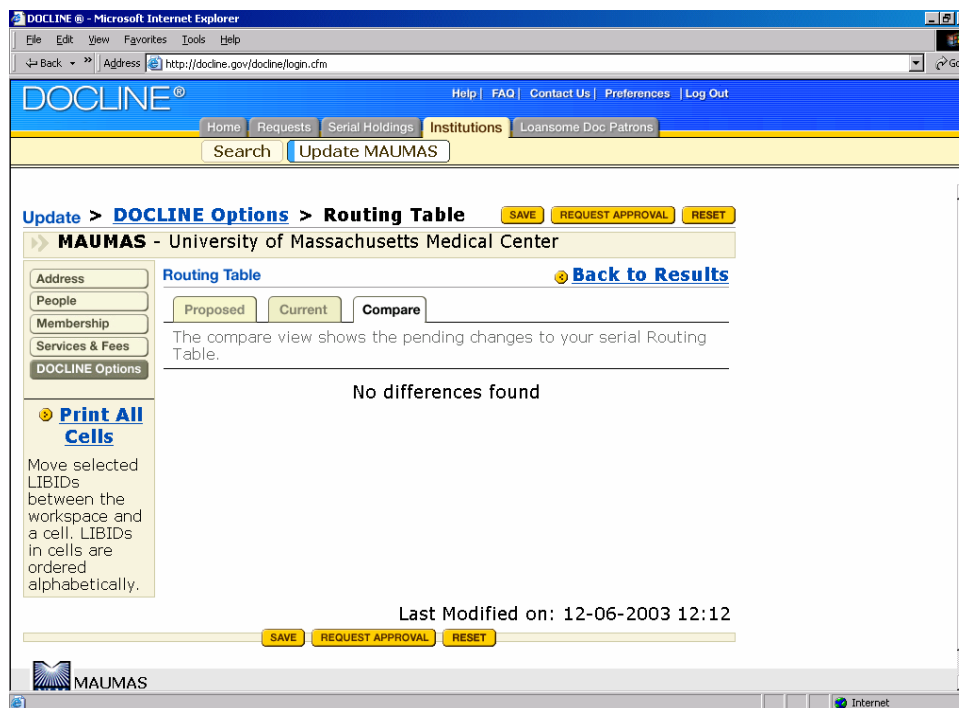
Notes:

- Even though you have saved changes to your Routing Table by clicking **Save**, changes do not actually take effect in Production until your DOCLINE Coordinator at the RML approves them.
- A message on your Home page will alert you that your Routing Table is under review. Once approval has occurred, the message on your Home page will be removed.
- Click on the Proposed, Current, and Compare tabs to take a less far-sighted, “forest” view of your table.

B-23. Update Your Routing Table

STEP	ACTION: View Routing Table Changes
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit Routing Table link on the Institution Navigation bar. -or- Click Edit Routing Table in the <i>Serial Routing</i> area of the <i>DOCLINE Options</i> page.
View	Your "Proposed" Routing Table and its associated Workspace displays. The Proposed tab allows you to edit your Routing Table and consists of your Routing Table currently in use by DOCLINE for routing plus any changes you have made. The Workspace contains any libraries which you have added from Institution Search, added via <i>Add to Workspace</i> on this page, or previously moved from the current Routing Table.
5	Click on Current tab.
View	The Compare tab displays the difference between your Routing Table currently in use by DOCLINE for routing and your "Proposed" Routing Table which contains your changes.

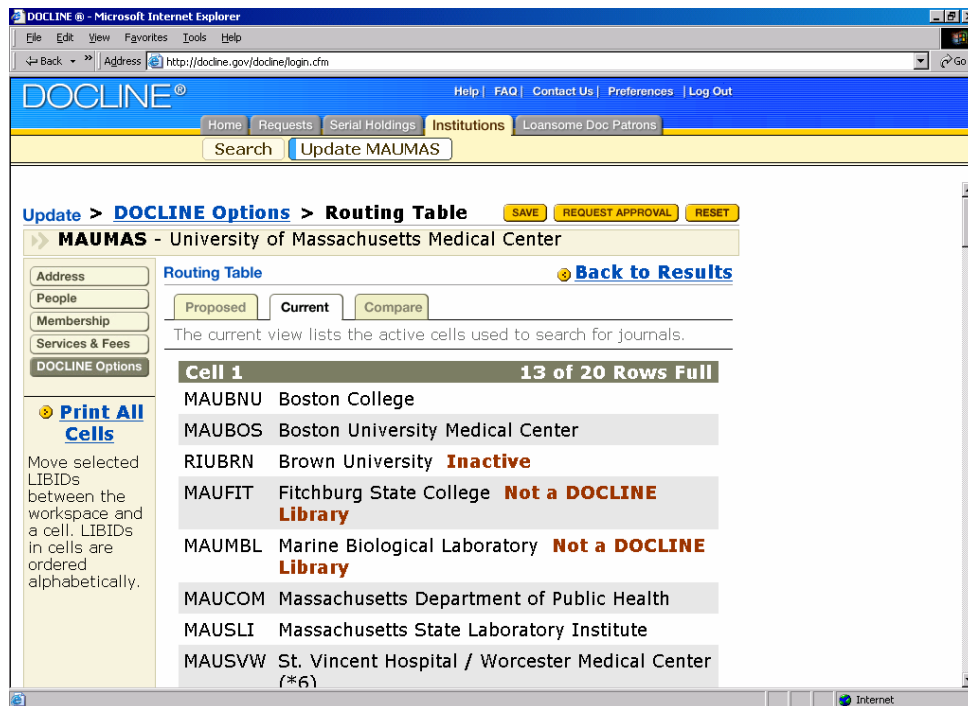
Click the **Compare** tab to view changes that occur between **Proposed** and **Current**



B-23. Update Your Routing Table

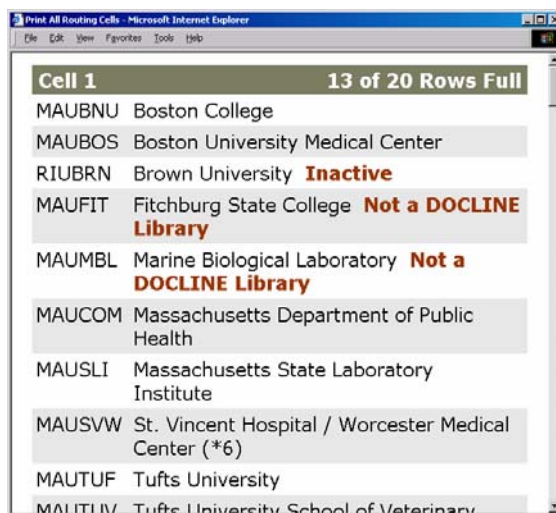
STEP	ACTION: View Current Routing Table
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit Routing Table link on the Institution Navigation bar. -or- Click Edit Routing Table in the <i>Serial Routing</i> area of the <i>DOCLINE Options</i> page.
View	Your "Proposed" Routing Table displays. The Proposed tab allows you to edit your Routing Table and consists of your Routing Table currently in use by DOCLINE for routing plus any changes you've made (additions, deletes, moves). The Workspace contains any libraries which you've added from Institution Search, added via Add to Workspace on this page, or previously moved from the current Routing Table .
5	Click the Current tab.
View	The Current tab displays the Routing Table currently in use by DOCLINE for routing.

Click the **Current** tab to view the entire Routing Table as it now exists in production -



B-23. Update Your Routing Table

STEP	ACTION: Print Routing Table
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit Routing Table link on the Institution Navigation bar. -or- Click Edit Routing Table in the Serial Routing area of the <i>DOCLINE Options</i> page
5	Click on the Print All Cells link.
View	Your library's current Routing Table is displayed.
6	Print via your browser's printing function (File, Print).
7	Close the Print window.



Cell 1	13 of 20 Rows Full
MAUBNU	Boston College
MAUBOS	Boston University Medical Center
RIUBRN	Brown University Inactive
MAUFIT	Fitchburg State College Not a DOCLINE Library
MAUMBL	Marine Biological Laboratory Not a DOCLINE Library
MAUCOM	Massachusetts Department of Public Health
MAUSLI	Massachusetts State Laboratory Institute
MAUSVW	St. Vincent Hospital / Worcester Medical Center (*6)
MAUTUF	Tufts University
MAUTUM	Tufts University School of Veterinary

B-23. Update Your Routing Table



Notes:

- You will NOT be permitted to enter your own LIBID - it will be rejected by the system!
- Don't mix apples with oranges - "charge-free" and "charge-fee" lending libraries should never be stored within the same routing cell.
- You have a total maximum of 180 slots spread out over 9 cells; there is no need to fill them all.
- There's a random algorithm at work behind the scenes. Remember it does not matter where libraries fall within a particular cell -- an automatic search proceeds hierarchically **across** cells, **not within** them.
- Remove problem libraries: whether it is due to understaffing or other difficulties. Sometimes libraries cannot offer the rapid service needed and expected by others. If you find that your requests frequently sit unacknowledged at a specific library before routing onward, you may want to remove them from your Routing Table. You can always add them back at a later date.
- Reduce your reliance on "prefixing":
 - let DOCLINE identify which libraries own the correct journal title and volume
 - if you're frequently prefixing requests, you may want to make changes to your Routing Table
- Your Routing Table is the key to efficient use of the DOCLINE system.

B-24. Update Your M/A/N Map

The M/A/N Map is an ordered list of institutions to which your monographic, audio/visual, and journal titles not in NLM's OPAC requests will route. The institutions listed are generally your primary lending partners. The M/A/N Map is comprised of nine (9) rows. The order of routing is sequential from Row 1 through Row 9.

The Workspace is a holding area for institutions being added or moved as libraries work on modifying their M/A/N Map over a period of time.

STEP	ACTION: Add Lending Libraries
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit M/A/N Map link on the Institution Navigation bar -or- Click Edit M/A/N Map in the <i>Monographs, Audiovisuals, and Non-NLM Journal Routing</i> area of the <i>DOCLINE Options</i> page.
View	The M/A/N Map and its associated Workspace displays. The Workspace contains any libraries which you've added from Institution Search, added via <i>Add to Workspace</i> on this page, or previously moved from the M/A/N Map.
5	(Optional) In the <i>Add to Workspace</i> area, enter a valid LIBID and click Add . The institution is added to the Workspace.
6	In the Workspace, select the library or libraries to add to the M/A/N Map by checking the box next to the institution name. Click the arrow pointing from the Workspace to the M/A/N Map. The institutions are added to the bottom of the ordered list in order by LIBID -or- In the Workspace: select one (1) library to add by checking the box next to the institution name; select "Move to Row #" from the list box and click Go . The institution is inserted at that row position. Institutions are automatically reordered, moving each institution down one row.
7	To add more institutions, repeat Step 6.
8	Click Save .

Strategies for setting up an M/A/N Map vary from region to region. Your DOCLINE coordinator can provide valuable guidance for managing your M/A/N Map.

B-24. Update Your M/A/N Map

STEP	ACTION: Move Lending Libraries
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit M/A/N Map link on the Institution Navigation bar -or- Click Edit M/A/N Map in the <i>Monographs, Audiovisuals, and Non-NLM Journal Routing</i> area of the <i>DOCLINE Options</i> page.
View	The M/A/N Map and its associated Workspace displays. The Workspace contains any libraries which you've added from Institution Search, added via Add to Workspace on this page, or previously moved from the M/A/N Map.
5	In the M/A/N Map, select a library to move within the M/A/N Map by checking the box next to the institution name.
6	Select "Move to Row #" from the list box and click Go . Institutions are automatically reordered, moving the other institutions in the list up or down.
7	To move additional institutions, repeat Steps 5-6.
8	Click Save .

Update Your M/A/N Map

STEP	ACTION: Remove Lending Libraries
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit M/A/N Map link on the Institution Navigation bar. -or- Click Edit M/A/N Map in the <i>Monographs, Audiovisuals, and Non-NLM Journal Routing</i> area of the <i>DOCLINE Options</i> page.
View	The M/A/N Map and its associated Workspace displays. The Workspace contains any libraries which you've added from Institution Search, added via Add to Workspace on this page, or previously moved from the M/A/N Map.
5	In the M/A/N Map, select the library or libraries to delete from the M/A/N Map by checking the box next to the institution name.
6	Click the right pointing arrow to move the institution to the Workspace for later use. -or- Click Delete . Institutions are automatically reordered, moving each library up.
7	To move additional institutions, repeat Steps 5-6.
8	Click Save .



Notes:

- If your institution utilizes OCLC for all monographic borrowing, it is **NOT** necessary to fill in an M/A/N map.
- The first cell in your M/A/N Map should contain your primary lenders of monographs, audiovisuals, and non-serial titles (usually a large Resource Library with an extensive collection.)

END OF SECTION B

